

Purpose

This SOP is intended to outline the process of creating an RF Management Case.

Teams Impacted

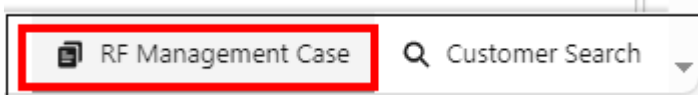
- Vendor Relations
- CarShield Users
- Claims
- Customer Service

Procedure

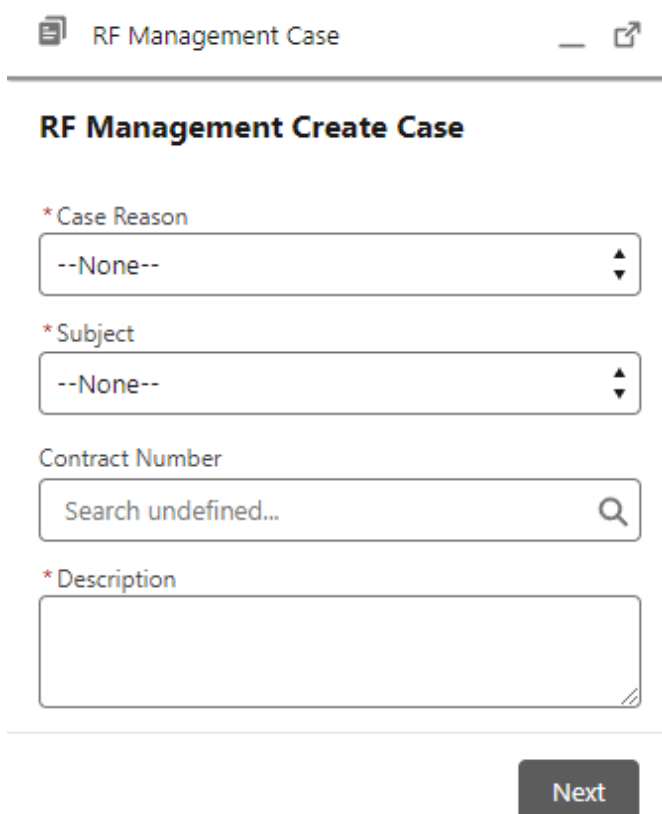
Note: RF Management cases should only be created when,

- 1) A preferred repair facility is asking to be removed from network
- 2) No repair facilities are listed in contract holder's area
- 3) Payment related concern
- 4) Questions on procedure
- 5) Teardown
- 6) Update profile information

1. From CMS Dashboard, Click **RF Management Case** tab at the bottom in CMS.



2. The **RF Management Create Case** window will appear.

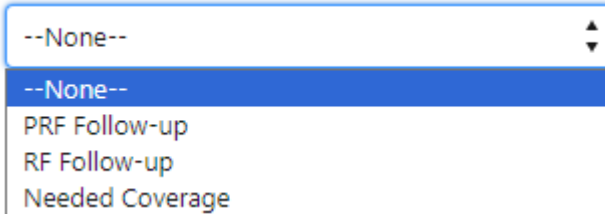
A screenshot of a web form titled 'RF Management Create Case'. The form has a header bar with a document icon and the title. Below the header, there are four main sections, each with a label and a form field:

- * Case Reason**: A dropdown menu with '--None--' selected.
- * Subject**: A dropdown menu with '--None--' selected.
- Contract Number**: A search bar with the placeholder text 'Search undefined...' and a magnifying glass icon.
- * Description**: A large text area for entering details.

At the bottom right of the form, there is a dark grey button with the text 'Next'.

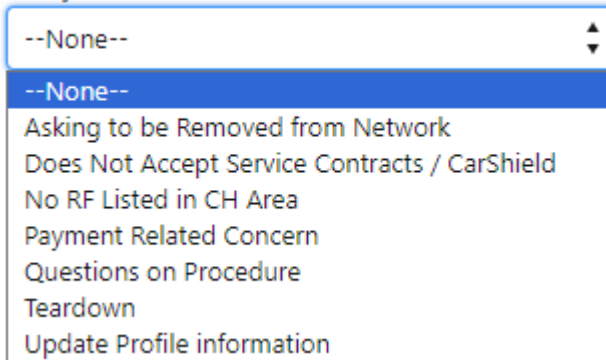
3. For **Case Reason** PRF Follow-up or RF Follow-up, open the drop down menu to select one of the two options. (For **Case Reason** Needed Coverage, skip down to step 9)

* Case Reason



4. Select one of these subjects in the **Subject** dropdown menu:
- a. Asking to be Removed from network (only applicable to PRF Follow-up)
 - b. Does Not Accept Service Contracts / Carshield
 - c. Payment Related Concern
 - d. Questions on Procedure
 - e. Teardown
 - f. Update Profile Information

* Subject



5. When a case is being reported by a contract holder, their contract number is required. If reported by an RF, it's not required, because you may not have it.

Contract Number

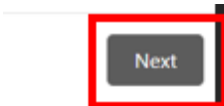


6. In the **Description** box, leave a brief description of the reason why this case is being created.

* Description



7. Click Next



8. Type in the RF's zip code and click the magnifying glass.
 - a. This will populate all the RFs in the area.
 - b. **Select** the correct RF and you will be automatically directed to the next screen.

RF Management Create Case

Based on the Case Reason selected you must select a Repair Facility below to continue.

Zip Code

Name	Address

Previous

- c. Here, you'll review the details of the case. If satisfied, click **Create Case**. If you need to edit, click **Previous**.



RF Management Case

RF Management Create Case

Selected Repair Facility Info

Name :

Phone :

Address :

Case Info

Reason: PRF Follow-up

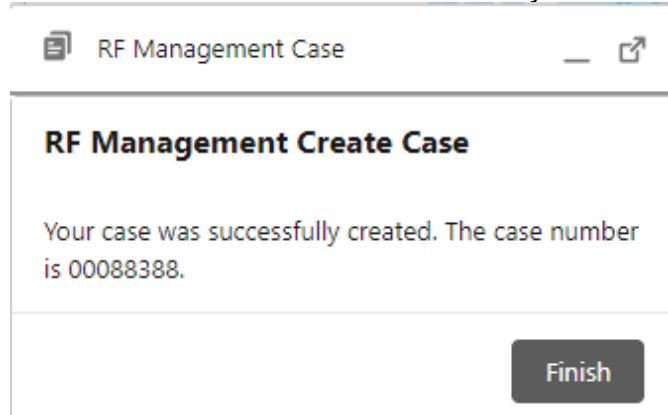
Subject : Questions on Procedure

Contract Number :

Case Description

brief description of the reason why this case is being created.

- d. Document your Case number just in case a follow up is needed with the Vendor Relations Team and click **Finish** when you are done.

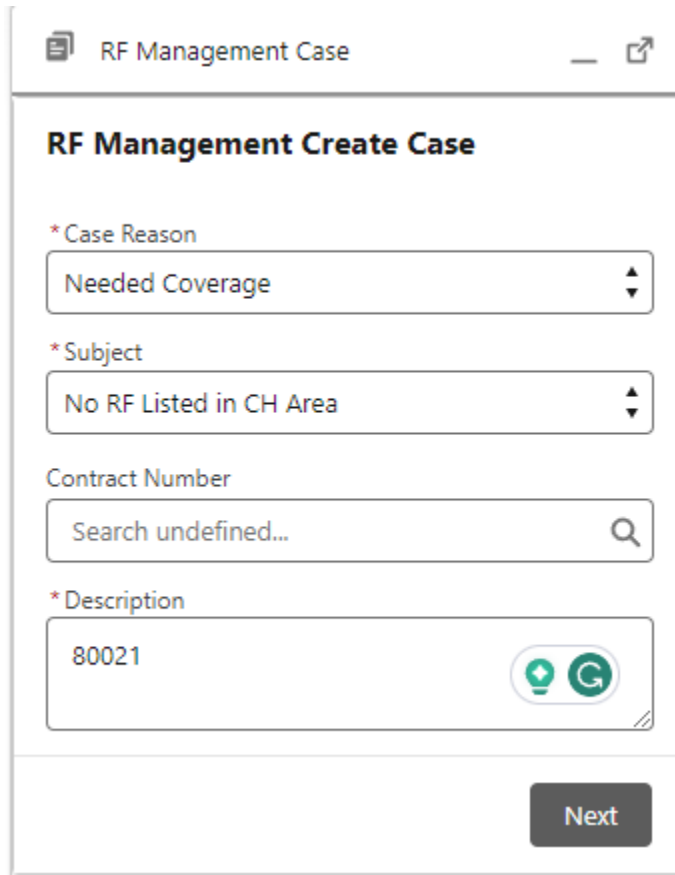


RF Management Case

RF Management Create Case


Your case was successfully created. The case number is 00088388.

9. For **Case Reason** Needed Coverage:
- Select Subject No RF Listed in CH Area
 - In **Description**, enter the zip code
 - Click **Next**



The screenshot shows a web application window titled "RF Management Case". Inside, there is a form titled "RF Management Create Case". The form has four main sections: 1. "* Case Reason" with a dropdown menu showing "Needed Coverage". 2. "* Subject" with a dropdown menu showing "No RF Listed in CH Area". 3. "Contract Number" with a search bar containing the text "Search undefined...". 4. "* Description" with a text input field containing "80021" and a green circular icon with a white 'G' to its right. At the bottom right of the form is a dark grey button labeled "Next".

- d. Here, you'll review the details of the case. If satisfied, click **Create Case**. If you need to edit, click **Previous**

 RF Management Case

RF Management Create Case


Case Info
 Reason: Needed Coverage
 Subject : No RF Listed in CH Area
 Contract Number :

Case Description
 80021

Previous

Create Case

- e. Document your Case number just in case a follow up is needed with the Vendor Relations Team and click **Finish** when you are done.

 RF Management Case

RF Management Create Case

Your case was successfully created. The case number is 00087186.

Finish

Approval & Revision

Date Created 01/12/2024	Created By Ashley “Dani” Freeman	Date Approved 01/12/2024	Approved By Dept: Eldridge Dela Cruz	
Date Revised 1/16/2024	Revised by Ashley “Dani” Freeman	Revision Description, Replaced blurry images; redacted RF info	Date Approved 1/17/2024	Approved By Eldridge Dela Cruz



SOP: RF Management Case

Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]